Registration is open for the OpenPages User Symposium (OPUS)! OPUS 2008 will be an opportunity for you to chart your own course – whether it is mapping out your upgrade path, or converging your risk and compliance programs.

OPUS offers OpenPages customers and partners the perfect forum for sharing the latest governance, risk and compliance management information, industry thought-leadership, in-depth product presentations and case studies. This year, we are focusing on providing more hands-on product sessions, as well as more structured birds-of-a-feather discussion groups that will help you map out the best strategy for advancing your GRC initiatives. And as always, OPUS will provide the depth and breadth of content you have come to rely upon to get the most our of your OpenPages project.

You won't want to miss the event – the ideal opportunity to network, share experiences and socialize with people who have something in common – OpenPages.

2008 Location:
Renaissance Boston Waterfront Hotel
606 Congress Street Boston, MA
617.338.4111

Fees:
OPUS Registration Fees:

SINGLE: $1995

MULTIPLE: $1895
(two or more from one company)

Register at:
www.openpages.com/opus

For more information contact John Kelly at:
john_kelly@openpages.com
or
781.693.5925

OPENPAGES

TOP FIVE REASONS YOU SHOULD ATTEND OPUS:

1. Learning Opportunities:
- OPUS has **great keynote speakers**, from David Holcombe of NASCAR and Mark Beasley, Deloitte ERM professor at NC State.
- **Case studies from industry leaders** providing concrete examples of what works and what doesn't work. Learning from practiced OpenPages users can save you time and energy as you look to move your company's OpenPages implementation to the next level.
- We've invited the most **respected industry analysts** to OPUS, including French Caldwell from Gartner, Chris McClean from Forrester and John Hagerty from AMR Research. These industry thought leaders can provide you with an independent perspective on the GRC market and the best strategies for deployment.

2. CPE Credits:
- All OPUS sessions count toward **CPE credits registered through the National Association of State Boards of Accountancy (NASBA).** By attending OPUS you can fulfill 15 credits toward your yearly professional competencies needed to maintain your license.

3. Hands-on Sessions:
- Our Hands-on workshops will, for the first time, provide **intensive on-site instruction on reporting, workflow and configuration.** These sessions were one of the most requested potential additions to OPUS, so we dedicated a whole track to hands-on workshops.
- This year there will be several **sessions on OpenPages solutions for expanded use of the platform.** Every organization is struggling with how to manage multiple GRC initiatives, and OpenPages can provide a common infrastructure for a variety of initiatives, including audit, policy management, and privacy.
- The **OpenPages Pavilion** will be open all day for in-depth product demonstrations.

4. Shared Best Practices:
- OPUS provides a **forum for OpenPages customers to interact** with each other and share best practices about how to maximize your OpenPages implementation.
- This year we've also added a session with OpenPages engineering. Here you will have a chance to **interact directly with the engineers** that have built the GRC industry's leading platform.

5. Networking Events:
Besides stellar educational sessions, OPUS has a history of offering fun opportunities for attendees to network and interact. This year is no different! We are excited to announce **two unique networking events that will allow you see Chart Your Own Course and see Boston in a whole new light.**
- **Welcome Cocktail Reception followed by "Dinner with New Collegues:"** Stop by for a drink and a pre-dinner bite at our Welcome Reception. Then head out for a more intimate dinner with a small group of follow attendees to your choice of one of Boston's premiere restaurants. The people in your party might be strangers when your seated but we are confident they will be friends and business allies by the time dessert is served.
- **Clambake at the Historic USS Constitution:** Join the OpenPages team for a casual New England Clambake overlooking the Boston skyline on the pier of the USS Constitution – America's oldest war ship afloat and in commission.

DAY ONE – MONDAY, OCTOBER 20TH

TIME	Stream 1	Stream 2	Stream 3	Stream 4
8:00 AM – 9:55 AM	REGISTRATION			
10:00 AM – 10:45 AM	Opening Keynote Michael J. Duffy, President and CEO, OpenPages			
10:50 AM – 11:45 AM	Safety and Risk Management in Motorsports: David Holcombe, Director of Risk Management, International Speedway Corp. and NASCAR			
11:50 AM – 12:55 PM	Lunch / OpenPages Pavilion			
1:00 PM – 1:55 PM	Streamlining GRC Processes with OpenPages 5.5	Customer Case Study: The Power Of Risk – Integrating Risk for Better Business Performance *Carnival Corporation*	Risk Management Convergence *Steinberg Governance Advisors, Inc.*	OpenPages 5.5 Hands-On Workshop: Workflow
2:00 PM – 2:55 PM	Aligning Business and IT for Effective GRC Solutions *Gartner Research*	Customer Case Study: Maintaining Compliance with OpenPages GCM *Duke Energy*	Operationalizing Risk Convergence in the OpenPages Platform	
3:00 PM – 3:30 PM	Break / OpenPages Pavilion			
3:35 PM – 4:30 PM	Integrating IT Governance with Enterprise Risk and Compliance Management	Customer Case Study: Operational Occurance – Control Beyond SOX *Aviva*	Corporate Social Responsibility: The Growing Influence of GRC *Forrester Research*	OpenPages 5.5 Hands-On Workshop: Creating Profiles and Home Page Configuration
4:35 PM – 5:30 PM	Managing Reporting Periods with OpenPages 5.5	Customer Case Study: Moving Beyond Compliance to Integrated Enterprise Risk Management *TD Ameritrade*	OpenForum Meeting	
5:30 PM	Welcome Reception			

10:00 AM

Opening Keynote

Presented by: Michael J. Duffy, President & CEO, OpenPages

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics and Management Advisory Services

Today's volatile capital markets, the rise of sustainability initiatives, increased cost of energy, specter of increased regulation, and exposure to reputational risk are all driving a fundamental change in the way companies worldwide manage risk. Risk management processes have grown up in functional silos which, overall, provide little visibility into global risk exposure.

GRC technology provides a foundation to manage risk across the enterprise and to help improve business performance through reduced losses, more efficient operations, and a better allocation of investment capital. In this session, OpenPages President and CEO Michael J. Duffy will outline OpenPages' vision to help our clients improve business performance with GRC solutions that provide a view into global risk exposure and address emergent risk management challenges.

10:50 AM

Safety and Risk Management in Motorsports

Presented by: David Holcombe, Director of Risk Management, International Speedway Corporation and NASCAR, INC.

Course Level: All Expertise Levels

Field of Study: Management Advisory Services

Safety and risk management have always been a part of racing. Words like "loss prevention" have not been a part of a racer's vocabulary, but, the desire to reduce the chance of injury has always been present. In his keynote presentation, David Holcombe, Director of Risk Management at the International Speedway and NASCAR, will follow the evolution of race cars and safety management from the 1950's to the present.

Holcombe will also look at the challenges facing large motorsport facilities, and in particular, managing risk at these large public gatherings. In addition, he will look at the diverse non-racing exposures created by the growth of this industry.

1:00 PM

Streamlining GRC Processes with OpenPages 5.5

Presented by: John Lundgren, Director, Enterprise Software Products, OpenPages

Course Level: All Expertise Levels

Field of Study: Computer Science and Management Advisory Services

The OpenPages Platform provides Users of varying roles with the ability to measure and manage risk across numerous areas. In this session, we will focus on both the Home Page and Activity Views and how they can be utilized to streamline GRC activities.

Customer Case Study: The Power of Risk – Integrating Risk for Better Business Performance

Presented by: Richard Brilliant, Vice President and Chief Audit Executive Carnival Corporation & plc

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics and Management Advisory Services

In this session you'll hear how Carnival Corporation & plc is integrating Internal Audit, SOX and Enterprise Risk Management across their business lines for improved business performance. You'll learn the important role of Internal Audit in Carnival's risk and compliance processes and understand the importance of setting the right foundation (e.g., objectives, roles/responsibilities, and tone) prior to engaging in initiatives to leverage the "power of risk." Lastly, we'll explore options for confronting the complexities associated with risk classification, risk assessment, and risk reporting – and how to avoid potential pitfalls.

Risk Management Convergence

Presented by: Richard M. Steinberg, Founder and CEO of Steinberg Governance Advisors, Inc.

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics and Management Advisory Services

Nationally recognized corporate governance expert Richard M. Steinberg will address how leading organizations have brought together disparate pockets of risk management to form highly effective integrated enterprise risk management processes. This session will highlight factors critical to success, as well as internal roadblocks and pitfalls typically encountered and how these challenges have been successfully met – with pragmatic and efficient solutions. Mr. Steinberg brings vast experience, including real life implementations, to demonstrate what works, and what doesn't, to achieve effective ERM.

1:00 PM   (2 hour session)

OpenPages 5.5 Hands-On Workshop: Workflow

Presented by: Ben Baker, Technical Trainer, OpenPages

Course Level: Intermediate

Field of Study: Computer Science

In this interactive session you will complete hands-on exercises to build a simple Job Type (workflow template). The session will provide participants with an overview of workflow concepts and terminology and the workflow user interface. The instructor will demonstrate how to build a simple workflow containing two tasks. You will then create your own workflow and then test the workflow by manually submitting it. You will then log in to the OpenPages training environment and complete the workflow task that you just submitted.

2:00 PM

Aligning Business and IT for Effective GRC Solutions

Presented by: French Caldwell, Vice President, Gartner Research

Course Level: Intermediate

Field of Study: Management Advisory Services and Computer Science

The complexity of business and IT alignment is a challenge that is rarely faced head-on. However, in the arena of governance, risk and compliance (GRC), that alignment can lead to improvements not just in the effectiveness of compliance and risk management programs, but also to improvements in business performance. Learn the key drivers, foundational GRC technologies, organizational strategies and architectural principles of business-oriented risk management and compliance solutions including:

- What are the key drivers that will affect the future for compliance and risk management through 2015?
- What is the role of information technology in supporting GRC processes and objectives?
- What are the principles and best practices that can be implemented to best align IT risk management and compliance investment to business strategies?

Customer Case Study: Maintaining Compliance with OpenPages GCM

Presented by: Mark Hollis, Corporate Compliance Manager, Duke Energy

Course Level: Intermediate

Field of Study: Management Advisory Services and Computer Science

Duke Energy uses OpenPages GCM to actively maintain compliance with a number of regulatory or legal initiatives. These initiatives range from utility specific regulatory requirements, Records Management, Data Privacy and potentially anything outside of SOX.

The objectives of the presentation are to present how Duke Energy uses OpenPages GCM, the object structure, some of the technical functionality employed, the end-user experience, potential future enhancements and some lessons learned. The discussion will be a high level overview of Duke Energy's use of OpenPages GCM with a more detailed discussion of technical aspects such as object profiles, object upload, notifications, tracking users with HR data, etc.

2:00 PM

Operationalizing Risk Convergence in the OpenPages Platform

Presented by: Scott Kwarta, Director, Professional & Advisory Services, OpenPages

Course Level: Intermediate

Field of Study: Regulatory Ethics, Management Advisory Services, Behavioral Ethics

Financial, operational, compliance, and IT risks are not mutually exclusive; they overlap and many times result from the same events and causes. In addition, the disciplines that organizations have established to manage these various risks share many of the same objectives, policies, procedures and processes. An integrated and converged risk and compliance management program will enhance an organization's ability to streamline and improve efficiencies in its risk management processes and be competitive in the market place, as it provides management greater visibility into risk and empowers management to make strategic business decisions based on a broader understanding of their risk profile. This session will focus on how companies can effectively leverage the OpenPages technology in their efforts to converge risk management disciplines and practices. Topics will include:

• Vision for risk convergence

• Areas of best practice

• Challenges faced

• Technology's role in convergence

3:35 PM

Integrating IT Governance with Enterprise Risk and Compliance Management

Presented by: Gary Zakon, Vice President of Engineering, OpenPages

Course Level: Intermediate

Field of Study: Management Advisory Services and Computer Science

Many organizations are implementing an enterprise approach to compliance and risk management as they view significant efficiencies in having all departments leverage the same enterprise GRC management solution – including the IT department. In this session, Zakon will discuss how organizations are using IT GRC management solutions from vendors like OpenPages to manage operational risks for IT-centric technology and process controls. Additionally, Zakon will present recommendations on what to look for in an IT GRC solution and provide insight into where these solutions are heading.

Customer Case Study: Operational Occurrence – Control Beyond SOX with OpenPages FCM

Presented by: David Fisher, Financial Controls Manager, Aviva/Norwich Union General Insurance

Course Level: All Expertise Levels

Field of Study: Auditing and Computer Science

The presentation will focus on what an Operational Occurrence is and the objectives of creating an Operational Occurrence, as well as its benefits. We will discuss how OpenPages FCM will be used to accomplish our compliance goals and objectives. We will also address developing workflows, rollout issues, resolutions paths and reporting. Norwich Union Insurance is part of the Aviva Insurance Group and the UK's number 1 Insurance Business. OpenPages FCM was implemented in mid 2007 to assist in continual improvement and enhancement of Norwich Union's financial operational controls.

Corporate Social Responsibility: The Growing Influence of GRC

Presented by: Chris McClean, Analyst, Forrester Research

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics, and Computer Science

Corporate social responsibility is often dismissed as a passing trend. But considering its place on the priority list of customers, shareholders, partners, regulators, and employees, organizations that don't take CSR seriously face very real, long-term risks. The expectations from these stakeholders continue to grow, and with widespread access to global information and financial implications at stake, companies are being watched more closely than ever.

Professionals responsible for GRC have the greatest potential to drive CSR improvements, and in many cases, the most to gain. This session explores the business case for better corporate social responsibility and explains how GRC tools and techniques are being used to drive CSR success.

3:35 PM   (2 hour session)

OpenPages 5.5 Hands-On Workshop: Creating Profiles and Home Page Configuration

Presented by: Ben Baker, Technical Trainer, OpenPages

Course Level: Intermediate

Field of Study: Computer Science

In this hands-on session, you will configure OpenPages Object Profiles to support business use cases. You will be presented with a business use case, followed by a discussion of best practices methodology to meet the business requirements, and finally a technical demonstration on configuring an Object Profile to fulfill the requirements. Working in the OpenPages training environment you'll create a profile, associate users to the profile, configure the home page and restrict user access to fields.

4:35 PM

Managing Reporting Periods with OpenPages 5.5

Presented by: Karen Wong, Senior Consulting Engineer, OpenPages

Course Level: All Expertise Levels

Field of Study: Auditing and Accounting

In this session, attendees will learn best practices and techniques for using OpenPages 5.5's enhanced Reporting Period and Object Reset functionalities to close out and lock down compliance data for a given reporting period, and reset data for the next reporting period.

Customer Case Study: Moving Beyond Compliance to Integrated Enterprise Risk Management

Presented by: Michael Chochon, Managing Director of Finance and Treasurer, TD Ameritrade

Course Level: All Expertise Levels

Field of Study: Computer Science and Accounting

This session will cover how OpenPages customer, TD Ameritrade, implemented the OpenPages FCM module, and its plan to integrate its risk management and compliance activities in a single management system. Learn about the business drivers and implementation approach for Phase 1 of the OpenPages integration that has enabled TD Ameritrade to further automate its ongoing testing and review of internal controls to reduce the time and resource costs associated with compliance. Phase 2, in the discussion state, focuses on fully integrating its enterprise risk management methodology into the OpenPages platform.

OpenForum Meeting

Presented by: John Kelly, Director of Product Marketing, OpenPages

Course Level: All Expertise Levels

Field of Study: This session does not qualify for CPE credits under the CPE Fields of Study

OpenForum's mission is building a bridge to connect users of OpenPages' solutions with their own peers, OpenPages and its affiliated partners, through information technology training and peer-to-peer networking. OpenForum serves as an additional liaison between OpenPages and its customer base, helping drive the direction of the company's solutions. This session is open to all customers who would like to actively participate in the user group and the evolution of its charter. It is a great chance to network with the thought leaders in the emerging governance, risk and compliance marketplace.

TUESDAY, OCTOBER 21, 2008

TIME	Stream 1	Stream 2	Stream 3	Stream 4
7:30 AM – 8:30 AM	Breakfast / OpenPages Pavilion			
8:30 AM – 9:25 AM	Aligning ERM and Strategy – Mark Beasley, Deloitte Professor of ERM and ERM Initiative Director, NC State University			
9:30 AM – 10:30 AM	OpenPages Technology Preview – OpenPages Chartered Course			
10:30 AM – 11:00 AM	Break / OpenPages Pavilion			
11:00 AM – 11:55 AM	Best Practices Round Table Discussions	Migrating to OpenPages 5.5	The Future of GRC *AMR Research*	OpenPages 5.5 Hands-On Workshop: OpenPages Command Center Reporting
12:00 PM – 12:55 PM	Best Practices Round Table Discussions	Breaking New Ground with OpenPages	Customer Case Study: Risk Management *First-Rand Banking*	OpenPages 5.5 Hands-On Workshop: OpenPages Command Center Reporting
1:00 PM – 1:50 PM	Lunch / OpenPages Pavilion			
1:50 PM – 2:45 PM	Customer Case Study: Implementing a Comprehensive Privacy Program *Barclays*	OpenPages Policy Management	Managing Role-Based User Experiences with OpenPages 5.5	OpenPages 5.5 Hands-On Workshop – Workflow (REPEAT)
2:45 PM – 3:15 PM	Break / OpenPages Pavilion			
3:15 PM – 4:10 PM	Customer Case Study: Implementing an Operational Risk Framework with OpenPages ORM *ICAP*	OpenPages Audit Management	Rationalizing IT Controls Across Multiple Regulations *Deloitte*	OpenPages 5.5 Hands-On Workshop – Workflow Con't (REPEAT)
4:15 – 5:10 PM	Discussion Groups: Topics Stem from Sessions		Ask The Engineer	
6:00 PM	Leave for Evening Networking Event – Clambake at USS Constitution			

8:30 AM

Aligning ERM and Strategy

Presented by: Mark S. Beasley, Professor, North Carolina State

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics and Management Advisory Services

The volume and complexity of risks facing most enterprises today are at all-time highs. At the same time, expectations for greater risk oversight by boards of directors and senior executives are rapidly increasing. Beasley will explore some of the key drivers of these changes, including external pressures for more effective top-down risk oversight coming from outside governance mechanisms such as the NYSE, credit-rating agencies, ISO, and the SEC. This session will also highlight how many organizations are responding by leveraging traditional risk management processes into an enterprise risk management (ERM) view of their key risks. Beasley will also explore how ERM should be linked to strategy planning to ensure that ERM is positioned to add value.

Objectives:
- Understand growing expectations for more effective risk oversight
- Appreciate external drivers for board and senior management engagement in ERM
- Identify benefits of positioning ERM with strategy planning
- Consider first steps to launching effective ERM

9:30 AM

OpenPages Technology Preview –
OpenPages Charted Course

Presented by:

Gordon Burnes, Vice President of Marketing and Sales, OpenPages

Patrick O'Brien, Director of Product Management, OpenPages

Course Level: All Expertise Levels

Field of Study: Auditing, Regulatory Ethics & Management Advisory Services

This session offers a first hand look at new technology directions for OpenPages. The presentation will cover upcoming OpenPages releases and solutions, and at the same time discuss future product directions. Garner insights from our technology experts, offer your perspective for future developments and walk away better prepared to plan for and further integrate your governance, risk and compliance initiatives into a single management system.

11:00 AM   (2 hour session)

Best Practices Round Table Discussions

Presented by:

Nick Trigg, Managing Consultant, OpenPages

Scott Kwarta, Director, Professional & Advisory Services, OpenPages

James Jorgenson, Managing Consultant, OpenPages

Bob Shapiro, Principal Business Analyst, OpenPages

Course Level: All Expertise Levels

Field of Study: Auditing, Regulatory Ethics & Management Advisory Services

The Best Practices Round Table brings together OpenPages experts to outline and discuss best practices for several areas including:

• Implementation methodologies

• Self assessments

• Change management

• Control testing

• Library management

• Audit

• Reporting periods

This interactive forum is designed to provide customers with advice on developing best practices.

11:00 AM

Migrating to OpenPages 5.5

Presented by: Cory Krieger, Managing Consultant, OpenPages

Course Level: Intermediate

Field of Study: Computer Science

This session will cover the upgrade and migration process for OpenPages 5.5 including:

• Infrastructure changes

• Time frames for upgrade

• Planning for validation by business groups

• Training for business groups

• Impact of new functionality on your migration effort, including:
  – User interface enhancements
  – Dependent fields
  – Security

• Impact of new functionality on reporting and workflow

• Data cleansing, consolidation, rationalization.

In this session we'll discuss the next steps your organization will want to take including:

• Detailed assessment for rolling out OpenPages 5.5

• Timing and resource planning, scheduling

• IT review

• New module implementation and unification

• Budget planning

The Future of GRC

Presented by: John Hagerty, Analyst, AMR Research

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics, Management Advisory Services, Behavioral Ethics

GRC is a global issue comprising many different initiatives—some regulatory, many policy driven—that cut to the core of every business, regardless of geography or industry. With over $32B in spending, it continues to be at or near the top of the agenda for both business and IT executives. As operational and enterprise risk management moves out of the shadow of compliance, GRC's complexion is changing. Hear what that portends for the future as GRC stretches and changes to accommodate a changing business and political climate.

11:00 AM — (2 hour session)

OpenPages 5.5 Hands-On Workshop: OpenPages CommandCenter Reporting

Presented by: Steve Sooby, Technical Trainer, OpenPages

Course Level: Intermediate

Field of Study: Computer Science

In this interactive hands-on session, OpenPages CommandCenter functions will be covered. You will be presented with a business use case, followed by a discussion of best practices methodology to meet the business requirements, a technical demonstration, and then you will create, troubleshoot, and run a report on your own sample OpenPages 5.5 environment.

12:00 PM

Breaking New Ground with OpenPages Solutions

Presented by: Greg Mueller, Director, Pre-Sales Consulting, OpenPages

Course Level: All Expertise Levels

Field of Study: Auditing, Regulatory Ethics & Management Advisory Services

The OpenPages Platform serves as the foundation for the full spectrum of enterprise risk management and provides customers with the ability to measure and manage numerous areas of risk. In this session, we'll discuss how OpenPages is extending its GRC platform to deliver solutions for new areas such as environmental, health and safety (EHS) risk, privacy risk, and strategic risk management.

Customer Case Study: Addressing Basel II with OpenPages ORM

Presented by: Vasie Naicker, Head of Shared Services, First-Rand Banking Group

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics, Accounting and Auditing

In this session, OpenPages customer FirstRand Banking Group will discuss how they have implemented OpenPages ORM to address Basel II capital allocation costs as part of the company's overall risk management strategy. FirstRand believes obtaining Basel II AMA regulatory approval can result in a competitive advantage and will speak to how FirstRand needed to implement a technology solution quickly in order to start the AMA application process, and speak to their requirements for a solution which would enable FirstRand to be self-sufficient in ongoing configuration of data and functionality.

1:50 PM

Customer Case Study: Implementing a Comprehensive Privacy Program

Presented by: Julian Parkin, Regulatory Programme Director, Barclays

Course Level: All Expertise Levels

Field of Study: Regulatory Ethics, Accounting and Auditing

Data privacy is one of the most important elements of a regulatory compliance program. In today's increasingly global marketplace, sensitive customer and employee data is sent instantaneously across borders and often distributed to a complex network of partners, contractors, and suppliers. Compounding the problem is the fact that privacy regulations vary across countries, regions and states. This session will describe Barclays' privacy initiative which has implemented a comprehensive privacy program across 60 jurisdictions world-wide. The session will discuss both the successes and the pitfalls, as well as the improvements planned as part of the new implementation based on OpenPages.

OpenPages Policy Management

Presented by: Julie Marobella, Senior Solutions Consultant, OpenPages

Course Level: All Expertise Levels

Field of Study: Auditing, Regulatory Ethics & Management Advisory Services

As organizations struggle with numerous external regulations and internally-driven risk factors, effective policy management can help a company manage internal business processes consistent with the risk and regulatory environment. Organizations are making the shift from a policy management function that is largely manual to one that is automated through systems like OpenPages. In this session, we'll discuss and demonstrate the key components of policy management:

• Mapping of external regulations to internal policies
• The process of creating and collaborating on those policies
• Ability to manage the communication of those policies and certify employee understanding
• Monitoring level of compliance with internal policies

Managing Role-Based User Experiences with OpenPages 5.5

Presented by: John Lundgren, Director, Enterprise Software Products, OpenPages

Course Level: All Expertise Levels

Field of Study: Computer Science & Management Advisory Services

The OpenPages Platform provides Users with a role-based view of their GRC system. In this session, we will focus on the many GRC roles and how best to configure users' role-based experiences via Profiles.

1:50 PM   (2 hour session)

OpenPages 5.5 Hands-On Workshop: Workflow (REPEAT)

Presented by: Ben Baker, Technical Trainer, Open Pages

Course Level: Intermediate

Field of Study: Computer Science

In this interactive session you will complete hands-on exercises to build a simple Job Type (workflow template). The session will provide participants with an overview of workflow concepts and terminology and the workflow user interface. The instructor will demonstrate how to build a simple workflow containing two tasks. You will then create your own workflow and then test the workflow by manually submitting it. You will then log in to the OpenPages training environment and complete the workflow task that you just submitted.

3:15 PM

Customer Case Study: Implementing an Operational Risk Framework with OpenPages ORM

Presented by: Dominic Earnest, Group Operational Risk Manager, ICAP

Course Level: All Expertise Levels

Field of Study: Management Advisory Services

In this session you will learn how OpenPages customer ICAP – a voice and electronic interdealer broker, designed and developed an extensible and repeatable operational risk framework by leveraging the self-assessments, end-user surveys, automated workflow and executive dashboards in OpenPages ORM. As a firm with fast changing contours, ICAP needed to ensure the ongoing quality of its internal controls while also putting in place more strict controls to gain greater visibility of overseas businesses. You'll hear first-hand, the business challenges, lessons learned and outcomes experienced by ICAP in implementing an enterprise risk framework.

OpenPages Audit Management

Presented by: Bob Shapiro, Principal Business Analyst, OpenPages

Course Level: All Expertise Levels

Field of Study: Auditing and Computer Science

This session will describe upcoming enhancements to OpenPages Audit, including multi-year graphical planning, enhanced resource allocation and scheduling, and the introduction of detailed time tracking. Learn how to use OpenPages Audit throughout the internal audit lifecycle of annual planning, audit planning, audit execution including electronic workpapers, findings and management action plans.

Rationalizing IT Controls Across Multiple Regulations

Presented by: Jeff Recor, Senior Manager, Security and Privacy Services, Deloitte

Course Level: All Expertise Levels

Field of Study: Computer Science and Management Advisory Services

In this session, you'll learn how leveraging the expertise of a trusted advisor can greatly speed your time to value. This session by Deloitte & Touche will walk through their Risk Catalog offering powered by the OpenPages platform. Risk Catalog is a framework for developing risk rationalized controls that empowers organizations to better manage risk and compliance in their IT environment. The Risk Catalog framework contains a set of integrated requirements and controls from well over 170 authoritative requirements, including CobiT, HIPAA, PCI, NERC, FFIEC handbooks and ISO 27001. In addition, you'll see how Deloitte & Touche's unique, streamlined risk and compliance management methodology can be deployed on the OpenPages platform, leading to greater efficiency and confidence in the state of risk and control in your organization.

4:15 PM

Discussion Groups: Topics Stem from Sessions

Presented by: Speakers from the past two days

Course Level: All Expertise Levels

Field of Study: Particular to the discussion in which you participate

In this session, attendees can personally meet with the first two days' presenters for informal discussions. The discussion groups are designed to cover specific topics or subtopics in a more interactive, conversational manner than the formal conference sessions offered during the day. Signup is required at the event.

Ask the Engineer

Presented by: Engineering Team

Course Level: All Expertise Levels

Field of Study: Accounting, Auditing, Management Advisory Services and Computer Science

In this open-ended discussion you'll have a chance to speak directly to the OpenPages' engineering team who will answer all your questions and gather enhancement requirements and feedback. This is your chance to speak to the experts and learn more about development plans and future directions – so bring your questions!

DAY THREE – WEDNESDAY, OCTOBER 22TH

TIME	Stream 1	Stream 2	Stream 3	Stream 4
8:00 AM – 8:55 AM	Breakfast			
9:00 AM – 9:55 AM	Customer Case Study: Leveraging the Capabilities of OpenPages to Implement an Integrated Risk Assessment Program *AIG*	Streamlining GRC Processes with OpenPages 5.5	Integrating Audit Tools with OpenPages FCM *TeamMate*	OpenPages 5.5 Hands-On Workshop: Command Center Reporting (REPEAT)
10:00 AM – 10:55 AM	Breaking New Ground with OpenPages Solutions (REPEAT)	OpenPages 5.5 Security Administration		
11:00 AM – 11:30 AM	OpenForum: The OpenPages User Group Annual Meeting			
11:35 AM – 12:00 PM	Closing Session – Michael J. Duffy			
12:05 PM – 1:00 PM	Box Lunch (Optional)			

9:00 AM

Customer Case Study: Leveraging the Capabilities of OpenPages to Implement an Integrated Risk Assessment Program

Presented by: John Simone, Director of Operational Risk Management, American International Group, Inc.

Course Level: All Expertise Levels

Field of Study: Management Advisory Services

This session will explore how AIG is using OpenPages to implement a comprehensive, integrated risk assessment program on one platform, encompassing ORM, Compliance and SOX. The session will walk participants through AIG's initial implementation of its SOX program on OpenPages, explain the current status of the RCSA initiative, and describe AIG's future vision in utilizing OpenPages to also collect internal loss data and develop key risk indicator information.

Key topics to be addressed include:

• Why OpenPages?
• Setting up a governance model around the initiative
• Demonstrating the value of an integrated RCSA program
• How to break down traditional risk silos
• How to create efficiencies and avoid redundancies
• Internal Audit's role
• The importance of communication
• How to measure ultimate success
• Challenges to success
• Leveraging OpenPages Advisory Services

Understand:

• How AIG is using OpenPages to implement the RCSA program
• The importance of one integrated RCSA process
• What management views as the critical success factors for this initiative

Streamlining GRC Processes with OpenPages 5.5 (REPEAT)

Presented by: John Lundgren, Director, Enterprise Software Products, OpenPages

Course Level: All Expertise Levels

Field of Study: Computer Science and Management Advisory Services

The OpenPages Platform provides Users of varying roles with the ability to measure and manage risk across numerous areas. In this session, we will focus on both the Home Page and Activity Views and how they can be utilized to streamline GRC activities.

Integrating Audit Tools with OpenPages FCM

Presented by: Randy Cowell, Senior Manger/Consultant, TeamMate

Course Level: Intermediate

Field of Study: Accounting, Auditing and Computer Science

This technical session will provide you with instruction on how to use third-party audit workpaper tools, such as TeamMate, in concert with OpenPages FCM for more efficient compliance audits. Interoperability between OpenPages FCM and PwC TeamMate enables companies to leverage the testing and review expertise within their internal audit organizations to further streamline Section 404 audits.

9:00 AM   (2 hour session)

OpenPages 5.5 Hand-On Workshop: CommandCenter Reporting (REPEAT)

Presented by: Ben Baker, Technical Trainer, OpenPages

Course Level: Intermediate

Field of Study: Computer Science

In this interactive hands-on session, OpenPages CommandCenter functions will be covered. You will be presented with a business use case, followed by a discussion of best practices methodology to meet the business requirements, a technical demonstration, and then you will create, troubleshoot, and run a report on your own sample OpenPages 5.5 environment.

10:00 AM

Breaking New Ground with OpenPages Solutions (REPEAT)

Presented by: Greg Mueller, Director, Pre-sales Consulting, OpenPages

Course Level: All Expertise Levels

Field of Study: Auditing, Regulatory Ethics & Management Advisory Services

The OpenPages Platform serves as the foundation for the full spectrum of enterprise risk management and provides customers with the ability to measure and manage numerous areas of risk. In this session, we'll discuss how OpenPages is extending its GRC platform to deliver solutions for new areas such as environmental, health and safety (EHS) risk, privacy risk, and strategic risk management

OpenPages 5.5 Security Administration

Presented by: Rich Hanagan, Director, Engineering, OpenPages

Course Level: All Expertise Levels

Field of Study: Accounting, Auditing, Management Advisory Services and Computer Science

This session will give you an introduction to the robust and easy to use role-based security administration feature which is part of the OpenPages 5.5 release. By attending this session you will learn how to easily create, apply, and manage new security roles, how to delegate administration responsibilities for different sub-organizations, and how security permissions are automatically maintained when organizational structure is altered, easing the burden on administrators.

11:00 AM

OpenForum: The OpenPages User Group Annual Meeting

Presented by: Richard Brilliant, Vice President and Chief Audit Executive, Carnival Corporation & plc

Course Level: All Expertise Levels

Field of Study: This session does not qualify for CPE credits under the CPE Fields of Study

This years OpenForum's annual meeting will include a recap of information determined onsite at OPUS along with the annual elections and reinstate of OpenForum Executive Leaders. We will also he hosting a meeting of the Product Enhancement Committee (PEC) so bring your feedback and ideas.

11:35 PM

Closing Session

Presented by: Presented by: Michael J. Duffy, President & CEO, OpenPages

CPE SPONSORS

OPUS is an official sponsor of the National Registry of CPE credits. OPUS attendees have the opportunity to earn up to 15 CPE credits in various fields of study including, but not limited to accounting, auditing and computer science through the method of group offering – live. Credit is earned at the rate of one credit per 50 minutes in session. No prerequisites or advanced preparation is required for most OPUS sessions. For advanced technical sessions, a general understanding of basic features and functionalities of the OpenPages software is recommended.

OpenPages is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN, 37219-2417. Web site: www.nasba.org

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CANCELLATION POLICY

Cancellations prior to July 31, 2008 will be refunded in full less a $100.00 processing fee. Cancellations made August 1 – September 7, 2008 will be refunded 50% of the total cost of the paid registration price. Any cancellations made after September 7, 2008 will have a 100% cancellation fee. Substitutions can be made up to the close of registration, Monday, October 6, 2008. Substitutions can not be accommodated between the close of registration and the start of the event.

2008 VENUE

Renaissance Boston Waterfront Hotel,
606 Congress Street
Boston, MA 02210
1-800-HOTELS-1(1-800-468-3571)

Reservations

A discounted rate has been established for $265.00 per night, plus applicable fees and taxes. To make your reservations call the hotel directly and ask for the OPUS room rate. Reservations must be made by Monday, September 29, 2008 to receive this special rate. Hotel rooms at the OPUS rate will sell out quickly and we recommend that you reserve your room as soon as possible.

The Renaissance Boston Waterfront is the newest kid on the Boston Block. Opening in January 2008, you will be treated to the new and fresh face of Boston. Just a short distance from Back Bay and the Financial District, the hotel is conveniently located to many attractions.

Experience Boston

Take some time to explore the exciting city of Boston! With its combination of both a deep history and modern marvels, Boston is an ideal city to experience!

You can extend your stay to take advantage of all that Boston has to offer.

We've even extended the group rate three days prior to the conference and three days after the conference to make it that much easier for you to enjoy! For more information on what Boston has to offer, visit these online resources.

www.bostonusa.com

www.cityofboston.gov/visitors

www.mbta.com